



University of  
St Andrews

## Ill-health retirement (for members of S&LAS)

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## **Table of contents**

1.	Introduction	3
2.	Long term absence meeting	3
3.	Long term absence reaching 6 months	3

## **1. Introduction**

1.1 Human Resources (HR) and the relevant line manager will normally arrange to meet with employees who are off on long term sickness absence or have a pattern of regular absence. These meetings will usually occur:

- after a period of continuous absence of 8 weeks;
- at the request of Occupational Health (OH);
- in the case of persistent short-term absence or in relation to issues of sickness related underperformance.

## **2. Long term absence meeting**

2.1 A discussion should take place to discuss any reasonable adjustments that may be put in place to assist an individual to return to work or achieve more regular working.

2.2 HR will then request an assessment of the individual from our OH provider to establish what (if any) recommendations and/or adjustments they can advise for the individual and their role to aid their return to post and/or support their attendance in the workplace.

## **3. Long term absence reaching 6 months**

3.1 After a period of absence of six months, HR will automatically request OH to complete a comprehensive report on the employee absence which will indicate if it is likely that an individual will be able to undertake their existing duties in the foreseeable future with or without reasonable adjustments and additional sources of support.

### **3.2 Next steps**

3.2.1 If the report suggests that a return to work as outlined in 3.1 is unlikely, a meeting, between HR, the Deputy Principal and the individual, will take place to discuss, inter alia, other employment options for the employee in the University.

3.2.2 If a defined course of action has been identified at, or immediately after the meeting, HR will provide a report to OH to notify them of the outcome of the meeting.

3.2.3 OH will be required to receive this information particularly if an employee is to make an application to the pension fund for early retirement on the grounds of ill-health. OH will receive all previous relevant documentation and can, therefore, provide HR with all necessary documentation (OH functional report, general practitioners' opinion, etc.) for the Trustees' information and consideration.

3.2.4 Once HR receive all relevant documentation, they will pass this on to the Trustees. This will only occur when they are satisfied that there is sufficient information to allow them to give incisive advice on the case for possible ill-health retirement to the Trustees. The Trustees will then determine the case, which may require them to refer the case to an independent assessor in the form of an occupational health consultancy which is not otherwise employed by the University; for example, OH and Safety Advisory Services, Fife Health Board (OHSAS)), for final determination.

### **Note**

- In order to ensure consistency of senior management approach in relation to ill-health retirement and related matters, all cases of early retirement (ill-health or otherwise) and

severance in the University will, in future, be dealt with by the Deputy Principal on behalf of the Principal's Office.

- In cases in relation to which it is unlikely that an individual will be able to return to work in the near future and ill-health retirement is not an option, the University may seek to terminate the contract by reason of medical incapacity by mutual agreement with the individual employee concerned or through execution of the University's capability procedure.

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1.0	Migration of policy to the Governance Zone.	Published	Lisa Harley, Human Resources	19/06/2019
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